

## 8 CHAPTER: VIEW EXTENSION INFORMATION

### 8.1 Overview

Taxpayers can request an extension of time beyond the original due date to file a tax return. This extended due date is determined based on the tax type, the federal requirements for extensions, and state law. If your MOU allows you access to return information, you can view extension information for business taxpayers in your locality or up to 20 adjacent localities, Sales Tax and Use Tax extension information for business taxpayers regardless of the locality, and individual taxpayers regardless of the locality on the Extension window in the IRMS Web application.

#### Extension Window

The illustration below is the Extension window.

The screenshot shows the IRMS (Individual Return Management System) Extension window. The window has a title bar with the IRMS logo and standard window controls. Below the title bar is a menu bar with 'File' and 'Help' options. The main content area is divided into several sections:

- Extension** (Section Header)
- General Information** (Table):

<b>Name:</b>	Boswell, Belinda
<b>SSN:</b>	123-45-6789
<b>Acct No:</b>	33-123456789S-001
<b>Tax Type:</b>	Individual Income
- Tax Account Period** (Table):

<b>Total Liabilities:</b>	\$0.00	<b>Filing Status:</b>	Not Filed
<b>Total Resources:</b>	\$0.00	<b>Due Date:</b>	05/01/2005
<b>Balance:</b>	\$0.00	<b>Ext. Due Date:</b>	09/01/2005
<b>TAP Status:</b>	Open		
- Extension Information** (Form):

<b>Submitted Date:</b>	04/13/2005	<b>Extended Due Date:</b>	09/01/2005	<b>Processed Date:</b>	04/15/2005
<b>Status:</b>	Approved	<b>Tax Representative:</b>	VATAX		
<b>Reason For Denial:</b>					
<b>Reason for Extended Due Date Change:</b>					

A 'Close' button is located in the bottom right corner of the window.

## Extension Window Fields

The table below lists the fields in the Extension window and provides a brief description of each.

Field	Field Type	Description
Name	System Generated	The name of the account holder (If an individual, the name(s) of the account holder(s). If a business, the name under which the business is legally registered).
SSN/FEIN	System Generated	The social security number (SSN) of the account holder(s) if an individual. The FEIN (Federal Employer Identification Number) of the account holder(s) if a Business, (If the Tax Type is a Sole Proprietor, then the SSN and FEIN, if available, displays).
Account No	System Generated	The number assigned to the Tax Account.
Tax Type	System Generated	The type of customer (i.e. individual, corporate, etc.).
Total Liabilities	System Generated	The total amount of tax owed for this period.
Filing Status	System Generated	Indicates if the filer has or has not filed a return for the period (i.e. Filed, Not Filed). Can also indicate if the return has been adjusted (i.e. Filed-Adjusted).
Total Resources	System Generated	The amount of credits applied, if any, the taxpayer has for this period.
Due Date	System Generated	The date the return is due for this period.
Balance	System Generated	The total amount of tax owed after any credits are applied for this period.
Ext. Due Date	System Generated	The date the return is due when an extension has been granted. If an extension has not been granted, this field is blank.
TAP Status	System Generated	The current state of the TAP (i.e. Open, etc.).
Submitted Date	System Generated	The date executed if electronically submitted; the postmark date if mailed; the hand-stamped date if delivered personally.
Extended Due Date	System Generated	The date by which the taxpayer must file a return after being granted the extension.
Processed Date	System Generated	The date IRMS processes the extension.
Status	System Generated	Indicates if the extension has or has not been approved.
Tax Representative	System Generated	Usually indicates that the extension was approved automatically by the system. If manually approved, the name of the approving representative will display.
Reason for Denial	System Generated	Text explaining why the extension was denied (Populated only when the Status is Denied).
Reason for Extended Due Date Change	System Generated	Text explaining why the extended due date was moved (Populated only when an existing extension date has been changed).

## 8.2 View Extension Information

To view extension information, the following steps are performed:

**Step 1:** Perform a **Customer Search** to open the Customer Profile window (see the *View Customer Profile Information* chapter of this User Guide for detailed information on performing a Customer Search).

The screenshot shows a web browser window titled "Customer Profile - Cusack, Joan - Microsoft Internet Explorer". The browser's menu bar includes "File", "Customer", and "Help". The "Customer" menu is open, showing options: "Tax Account", "Bank Account...", and "Bill Summary...". The main content area displays the profile for "Customer". The profile information includes:

- SSN:** 177-66-6661
- Entity Type:** Individual
- Name:** JOAN CUSACK
- Street:** 4000 LEGATO ROAD
- City:** FAIRFAX (selected from a dropdown menu)
- State:** VA (selected from a dropdown menu)
- Zip:** 22033
- ☐ **Undeliverable**
- Last Address Update:** 07/29/2005 11:59:40

A "Close" button is located in the bottom right corner of the profile window.

**Step 2:** From the Customer Profile window, select **Customer: Tax Account**. The Tax Account window opens.



IRMS

File Tax Account Period Help

Jan 2004 - Dec 2004

General Information		Tax Account Period	
Name:	Boswell, Belinda	Total Liabilities:	\$0.00
SSN:	123-45-6789	Total Resources:	\$0.00
Acct No:	33-235921632S-001	Balance:	\$0.00
Tax Type:	Individual Income	TAP Status:	Open
		Filing Status:	Not Filed
		Due Date:	05/01/2005
		Ext. Due Date:	09/01/2005

Entries

Type	Submitted Date	Processed Date	Amount	Status	Last Modified
Extension	04/13/2005	04/15/2005	\$0.00	Approved	04/15/2005

Open Close

**Step 4:** Double-click on the Extension entry.  
The Extension window opens.

